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**Global Analysis Report**

## *Health and wellness series*

# Functional foods and beverages

## in the United Arab Emirates

**March 2017**

### Executive summary

Fortified/functional (FF) foods and beverages are products with ingredients that are added for specific health benefits that are beyond basic nutrition. Retail sales of these products are benefiting from increasing interest from consumers in the United Arab Emirates who are eager to improve the healthiness of the foods and beverages that they consume. They are also benefiting from new product developments by companies looking to differentiate their products in the high-value segment.

The purpose of this report is to explore market conditions and identify opportunities and challenges for Canadian companies seeking to enter the FF packaged food and beverage market in the United Arab Emirates (UAE). Areas of focus include dairy, baby food, breakfast cereals, energy drinks, concentrates, and hot drinks.

FF dairy is the most significant product area in the FF packaged food segment, representing 33.2% of total FF packaged food sales. In 2015, FF baby food accounted for 29.8% value share and FF breakfast cereals represented 27.7% of total FF packaged food value share. Retail sales for FF energy drinks accounted for 84.5% of total FF beverage sales, while sales of FF concentrates accounted for 10.3%, and those for FF hot drinks represented 2.7% of total FF beverage sales.

In 2015, the top three companies for FF packaged food in the UAE were Danone (with the Activia brand), Nestlé (with the S-26 brand), and Kellogg (with the Special K brand); the top three companies for FF beverages in the UAE were Red Bull, Otsuka Holdings (with the Oronamin brand), and Sapporo Holdings (with the Vitaene C brand). With 88% of its population being foreign, it is not surprising that global companies are dominant in the UAE.

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## Introduction

Fortified/functional (FF) foods and beverages are products that contain added ingredients which are perceived to have a positive effect on health, beyond basic nutrition. These types of products are gaining popularity in the United Arab Emirates (UAE) as consumers with busy lifestyles try to adopt healthier eating habits by focussing on nutrients rather than on decreasing calorie intake.

Additionally, food processors are keen to support this trend seeing as products categorised as "value-added" are exempt from the country's strict government-enforced price caps on staple foods, and can therefore be sold at a higher cost, thus increasing profits.

The sub-categories within FF packaged food that this report will focus on include dairy, baby food, and breakfast cereals. Those within FF beverages include energy drinks, concentrates, and hot drinks.

## Market characteristics

It is important for Canadian companies who are interested in entering the UAE market to understand its unique characteristics. The UAE population is mostly made up of foreign residents. In 2015, approximately 88% of the country's 8.6 million inhabitants were expatriate workers from Asian and Western countries. These foreign residents generally fall within one of the following two key groups: the largest group, mostly made up of low-income labourers, generally from India, the Philippines, Pakistan, and Bangladesh; and a smaller group of professionals with high disposable income, often from Western countries such as the United Kingdom or other parts of the Middle East. The retail environment is impacted by these populations because many retailers choose to cater to specific population segments defined by ethnicity and income. It is important for Canadian exporters to consider these groups when identifying a target market and appropriate retail outlets.

FF packaged food sales in the UAE had a retail value of US$284.6 million in 2015, representing approximately 6.6% of total packaged food sales. FF dairy is the most significant category within FF packaged food, attracting mainly high-income consumers who are willing to spend more on a healthier diet. Although consumers are expected to gain more knowledge regarding the health benefits of specific vitamins and minerals over the next five years, they currently tend to base their purchasing decisions on packaging, preferring designs that look modern or luxurious (Euromonitor, 2016).

Retail sales of FF packaged food increased by 12.8% in 2015, while sale of FF beverages grew 8.6%. Growth in these areas may be due to the increasingly busy lifestyles of young adults and a growing awareness of health and nutrition. With a retail value of US$229.3 million in 2015, energy drinks is the most significant category, representing 41.2% of the total combined value of FF packaged foods and beverages.

The development of new products is expected to contribute to the continued sales growth of FF packaged foods and beverages. As young adults continue to adopt busier lifestyles, there may be increased opportunities for convenient and healthy breakfast cereals targeted toward adults. Although this region has experience a slowdown in economic activity in recent years due to the conditions of the oil and gas market, it is likely that EXPO 2020, which will be held in Dubai from October 2020 till April 2021, will stimulate economic activity. This event will likely increase the influx of visitors in the area, creating opportunities for innovative and high quality products, as well as products that are specifically developed for the food service industry.

## Retail sales

**Retail sales of fortified/functional (FF) packaged foods in the UAE, by segment**
**historic retail value in US$ millions**
**current prices – fixed 2016 exchange rates**

| Food categories | 2011 | 2012 | 2013 | 2014 | 2015 | % *CAGR 2011-15 |
|---|---|---|---|---|---|---|
| FF dairy | 61.3 | 66.6 | 72.5 | 79.2 | 94.5 | 11.4 |
| FF baby food | 61.9 | 67.2 | 71.1 | 77.0 | 84.9 | 8.2 |
| FF breakfast cereals | 60.9 | 66.5 | 70.4 | 74.1 | 78.8 | 6.7 |
| FF confectionery | 10.6 | 11.8 | 13.2 | 14.7 | 16.5 | 11.7 |
| FF vegetable and seed oil | 4.7 | 5.4 | 6.1 | 7.3 | 9.8 | 20.2 |
| **Total FF packaged foods** | **199.4** | **217.5** | **233.3** | **252.3** | **284.6** | **9.3** |

***Source:*** *Euromonitor International, 2016.*
**CAGR: compound annual growth rate*

**Retail sales of fortified/functional (FF) packaged foods in the UAE, by segment**
**forecasted retail value in US$ millions**
**current prices – fixed 2016 exchange rates**

| Food categories | 2016 | 2017 | 2018 | 2019 | 2020 | % *CAGR 2016-20 |
|---|---|---|---|---|---|---|
| FF dairy | 104.8 | 116.6 | 129.3 | 142.8 | 152.6 | 9.8 |
| FF baby food | 92.6 | 101.4 | 110.4 | 119.9 | 129.1 | 8.7 |
| FF breakfast cereals | 84.4 | 90.9 | 97.7 | 105.2 | 113.4 | 7.7 |
| FF confectionery | 18.5 | 20.6 | 22.9 | 25.2 | 27.4 | 10.3 |
| FF vegetable and seed oil | 10.7 | 11.9 | 14.3 | 17.3 | 21.1 | 18.5 |
| **Total FF packaged foods** | 310.9 | 341.2 | 374.6 | 410.3 | 443.5 | 9.3 |

***Source:*** *Euromonitor International, 2016.*
**CAGR: compound annual growth rate*

**Retail sales of fortified/functional (FF) beverages in the UAE, by segment**
**historic retail value in US$ millions**
**current prices – fixed 2016 exchange rates**

| Beverage categories | 2011 | 2012 | 2013 | 2014 | 2015 | % *CAGR 2011-15 |
|---|---|---|---|---|---|---|
| FF energy drinks | 173.4 | 182.3 | 196.5 | 210.7 | 229.3 | 7.2 |
| FF concentrates | 21.7 | 22.7 | 24.5 | 26.3 | 27.9 | 6.5 |
| FF other hot drinks | 6.1 | 6.3 | 6.5 | 6.9 | 7.3 | 4.6 |
| FF sports drinks | 4.6 | 5.0 | 5.5 | 5.9 | 6.5 | 9.0 |
| FF bottled water | - | 0.1 | 0.1 | 0.2 | 0.2 | - |
| FF carbonates | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.0 |
| **Total FF beverages** | **205.8** | **216.6** | **233.3** | **250.0** | **271.4** | **7.2** |

***Source:*** *Euromonitor International, 2016.*
**CAGR: compound annual growth rate*

**Retail sales of fortified/functional (FF) beverages in the UAE, by segment**
**forecasted retail value in US$ millions**
**current prices – fixed 2016 exchange rates**

| Beverage categories | 2016 | 2017 | 2018 | 2019 | 2020 | % *CAGR 2016-20 |
|---|---|---|---|---|---|---|
| FF energy drinks | 248.0 | 269.6 | 292.8 | 317.5 | 344.8 | 8.6 |
| FF concentrates | 29.3 | 31.1 | 33.0 | 35.1 | 37.3 | 6.2 |
| FF other hot drinks | 8.1 | 8.6 | 9.1 | 9.7 | 10.0 | 5.4 |
| FF sports drinks | 7.1 | 7.9 | 8.7 | 9.7 | 10.8 | 11.1 |
| FF bottled water | 0.2 | 0.2 | 0.3 | 0.3 | 0.3 | 10.7 |
| FF carbonates | 0.1 | 0.1 | 0.2 | 0.2 | 0.2 | 18.9 |
| **Total FF beverages** | 292.9 | 317.6 | 344.1 | 372.5 | 403.4 | 8.3 |

***Source:*** *Euromonitor International, 2016.*
**CAGR: compound annual growth rate*

## Key functional food and beverage categories in 2015

The following section provides information for the three key categories within FF packaged food - dairy, baby food, and breakfast cereals - as well as the three key categories within FF beverages - energy drinks, concentrates, and hot drinks. The information in this section has been sourced from Euromonitor International (2016).

### FF dairy

FF dairy is the most significant product area in FF packaged food, representing 33.2% of total FF packaged food sales. As consumers become increasingly aware of the benefits of probiotics for digestive health, retail sales for FF dairy continue to grow steadily. The retail value of FF dairy has increased by 54.2% since 2011, reaching US$94.5 million in 2015.

#### *Main sub-categories*

- FF dairy-based yoghurt was the largest sub-category within the FF dairy segment in 2015 with a retail value of US$76.1 million and accounting for 81% of FF dairy sales. While all areas of FF dairy-based yoghurt experienced strong growth, probiotic fruited yoghurt was the most dynamic performer with 70.8% value growth over the last five years. The second largest sub-category was FF milk powder with a retail value of US$9.5 million, followed by FF milk, worth US$8.9 million.
- Of the top three sub-categories, FF milk saw the most growth, with sales increasing by 270.8% in 2015.

#### *Main brands*

- The Activia brand by Danone Group led the FF dairy category in 2015 with 30.9% market share, followed by Al Rawabi Dairy Co.'s Al Rawabi brand (28.7%), and Danone Group's Actimel brand (12.4%).
- Activia by Danone group led the FF dairy-based yoghurt sub-category in 2015 with 38.4% market share, while Nestlé's Nido brand led the FF milk powder sub-category with 29.5% market share, and Al Rawabi Dairy Co.'s Al Rawabi brand led the FF milk sub-category with 92.8% market share.
- Within FF dairy, Actimel saw the most growth with a 216.2% increase in retail sales from 2011 to 2015 at a compound annual growth rate of 33.4%.
- Within FF milk powder, the Anchor brand by Fonterra Co-operative Group Ltd. saw the most growth in 2015, with retail sales increasing by 11.1%.
- Within FF milk, the Al Rawabi brand saw the most growth with retail sales increasing by an impressive 8200% over the last five years, at a compound annual growth rate of 201.8%. This is likely due to the launch of Al Rawabi Supermilk, which is fortified with the vitamins and minerals in which UAE residents have been found to be most commonly deficient.

#### *Forecasts for 2016 to 2020*

- Retail sales of FF dairy products are expected to increase by 45.6% in the next five years, reaching US$152.6 million in 2020.
- FF dairy-based yoghurt is expected to grow 45.7% in retail sales by 2020, at a compound annual growth rate of 9.9%
- FF milk powder is expecting to grow 13.4% in the next five years, at a compound annual growth rate of 3.2%.
- FF milk is expected to grow the most with 75.7% in the next five years, which would bump it up to the second largest sub-category within FF dairy by 2020, with anticipated retail sales of US$18.8 million.

## FF baby food

FF baby food includes milk formula to which ingredients (such as vitamins, minerals, probiotics, omega-3 etc.) have been added. It excludes organic and gluten free baby food as well as special milk formula. The sub-categories refer to age groupings: "standard" includes infant milk formulas in powder and ready-to-drink liquid form, which are given to babies usually between birth and six months; "follow-on" includes infant formulas in powder and ready-to-drink form which are given to babies aged between seven and 12 months, and "growing-up" includes infant formulas in powder and ready-to-drink form which are given to babies/toddlers from 13 months onwards.

FF baby food is the second largest product area in FF packaged food and accounted for 29.8% value share in 2015. In 2015, the FF baby food category had US$84.9 million in retail sales, representing a 37.2% increase over the past five years. It is expected that this category will continue to see growth over the next five years at a slightly increased compound annual growth rate of 8.7%, reaching a retail value of US$129.1 million by 2020.

### *Main sub-categories*

- Growing-up milk formula is the largest sub-category within FF baby food, worth US$33.6 million.
- Growing-up milk formula also experienced the most growth from 2011 to 2015, increasing 39.4% at a compound annual growth rate of 8.7%.
- The second largest sub-category is follow-on milk formula (US$28.4 million), followed by standard milk formula (US$22.9 million).
- In 2015, sales of standard milk formula increased by 10.1%, while sales for follow-on milk formula increased 8.4%.

### *Main brands*

- Nestlé's S-26 brand leads the FF milk formula category and all of it's sub-categories with just above 30% market share.
- The second largest brand within the growing-up milk formula sub-category in 2015 was Nido by Nestlé, with 15% market share, followed by Similac by Abbott Laboratories Inc., with 13% market share.
- The second largest brand for follow-on milk formula and standard milk formula is Nestlé's Nan brand, followed by Similac (Abbott Laboratories Inc.).
- Similac saw the most growth within the FF milk formula category in 2015, growing 18.3% in retail sales, followed by Nan (8.4%) and S-26 (7.4%).

### *Forecasts for 2016 to 2020*

- Retail sales of FF milk formula are expected to increase 39.4% from 2016 to 2020, reaching a value of US$129.1 million by 2020 (29.1% of total FF packaged food).
- The growing-up milk formula sub-category is expected to experience the most growth during the forecast period: 45.3% from 2016 to 2020, and at a compound annual growth rate of 9.8%.
- It is expected that by 2020, the growing-up milk formula sub-category will have retail sales of US$53.9 million, followed by the follow-on milk formula sub-category (US$39.7 million), and the standard milk formula sub-category (US$35.5 million).

## FF breakfast cereals

The FF breakfast cereals category includes ready-to-eat and hot cereals. Because fortification has become the industry standard within breakfast cereals, all breakfast cereals are included, with the exception of organic breakfast cereals, reduced fat breakfast cereals, reduced sugar breakfast cereals, and high fibre breakfast cereals.

Retail sales for FF breakfast cereals increased 29.4% from 2011 to 2015 at a compound annual growth rate of 6.7%, reaching US$78.8 million. FF breakfast cereals represented 27.7% of total FF packaged

food sales in 2015. This segment is expected to continue experiencing growth at a slightly more rapid rate of 7.7% from 2016 to 2020.

### *Main sub-categories*

- This segment does not contain sub-categories.

### *Main brands*

- The Kellogg's Special K brand led the FF breakfast cereal category with 12.3% market share in 2015, followed by Cereal Partners Worldwide's Fitness brand (11.9%) and Kellogg's Coco Pops (9.2%).
- Fitness saw a 108.9% increase from 2011 to 2015, while Coco Pops saw a 65.9% increase in sales, and Special K saw a 31.1% increase.

### *Forecasts for 2016 to 2020*

- It is anticipated that FF breakfast cereals will see a slightly larger increase of 34.4% in retail sales over the next five years, at a compound annual growth rate of 7.7%, which would bring it to a retail value of US$113.4 million by 2020.

## FF energy drinks

Retail sales for FF energy drinks in the UAE experienced 32.2% growth from 2011 to 2015. From 2014 to 2015, retail sales increased 8.8%, reaching US$229.3 million, which accounted for 84.5% of total FF beverage sales. The strong growth in this category may be due to the demands imposed by increasingly busy lifestyles of young consumers and the trendy image portrayed by marketing at popular sporting events. Energy drinks are most often used by students seeking more energy while studying, and consumers who need to drive long distances.

It is important to note that in 2015, the city of Sharjah banned the use of energy drinks in mixed beverages in the on-trade, as well as implemented a minimum age of 16-years-old for purchasing energy drinks.

### *Main sub-categories*

- This segment does not contain sub-categories.

### *Main brands*

- The Red Bull brand led FF energy drinks in 2015 with a 25% market share, followed by Otsuka Holdings Co Ltd.'s Oronamin brand (15.6%) and Sapporo Holdings Ltd.'s Vitaene C brand (14.3%).
- Of the top three brands, Vitaene C experienced the most growth in retail sales from 2011 to 2015 with a 29.6% increase.

### *Forecasts for 2016 to 2020*

- FF energy drinks are expected to see continued growth in retail sales over the forecast period (2016 to 2020), increasing by 39% to reach US$344.8 million in retail sales by 2020.
- Compared to the 7.2% compound annual growth rate during the review period (2011 to 2015), FF energy drinks are expected to experience a slightly increased compound annual growth rate of 8.6% during the forecast period (2016 to 2020).

## FF concentrates

FF concentrates grew by 28.6% from 2011 to 2015, at a compound annual growth rate of 6.5%. This segment was the second largest within FF beverages and represented 10.3% of the total FF beverages category. Products in this category are most commonly fortified with vitamin C.

### *Main sub-categories*

- FF concentrates is only made up of FF powder concentrates.

### *Main brands*

- The Tang brand by Mondelez International Inc. led FF concentrates with 82.1% market share in 2015, followed by Foster Clark (4.5%), and Mak-C (4%).
- Of the top three brands, Mak-C saw the most growth in 2015 with a 10% increase in retail sales.

### *Forecasts for 2016 to 2020*

- The FF concentrates category is expected to increase by 27.3% from 2016 to 2020 at a compound annual growth rate of 6.2%.
- By 2020, the FF concentrates category is expected to have retail sales of US$37.3 million, representing 9.2% of total FF beverages.

## FF hot drinks

The FF hot drinks category includes non-chocolate based flavoured powder drinks, and malt and plant based hot drinks with added ingredients such as vitamins and minerals. Note that reduced fat or "light" variants are excluded. The FF other hot drinks segment experienced a 19.7% increase in retail sales from 2011 to 2015, reaching US$7.3 million in 2015. FF plant-based and malt-based hot drinks experienced a surge in unit prices which was mainly due to products being taken off the shelves at mainstream grocery retailers and being mainly available at premium outlets.

### *Main sub-categories*

- FF chocolate-based flavoured powder drinks was the largest sub-category with retail sales on US$5.6 million in 2015, representing 76.7% of the FF hot drinks segment.
- The FF plant-based and malt-based hot drinks sub-category was the second largest sub-category in 2015 US$1.7 million in retail sales. This sub-category experienced the most growth in 2015, increasing by 21.4%, while FF chocolate-based flavoured powder drinks increased by 1.8%.

### *Main brands*

- Nesquik is the leading brand within the FF hot drinks category with 74.8% market share in 2015.
- Nesquik experienced a 34.1% increase in retail sales from 2011 to 2015, at a compound annual growth rate of 7.6%.
- This is a very diversified category, and "other" brands make up 25.2% of market share.

### *Forecasts for 2016 to 2020*

- This segment is expected to grow over the next five years by 23.5% at a slightly more rapid compound annual growth rate of 5.4%
- The FF chocolate-based flavoured powder drinks sub-category is expected to grow at a compound annual growth rate of 5.7%, while the FF plant-based and malt-based hot drinks sub-category is expected to grow at a compound annual growth rate of 4.1% from 2016 to 2020.
- By 2020, it is expected that FF chocolate-based flavoured powder drinks will represent 80% of the FF hot drinks category.

## Top companies

In 2015, the top three companies for FF packaged food in the UAE were Danone, Nestlé, and Kellogg. Danone led with 21.4% market share, followed by Nestlé (17.4%), and Kellogg (12.9%). Of the top three companies, Nestlé experiences the most growth since 2011, with its sales of FF packaged food increasing by 214.6%. However, Danone saw the most growth in 2015, increasing by 13.4%, compared to Nestlé at 7.4% and Kellogg at 4.3%. The top three companies for FF beverages in 2015 were Red Bull, Otsuka Holdings, and Sapporo Holdings. Red Bull led with 21.1% market share, followed by Otsuka Holdings at 14.3%, and Sapporo Holdings at 13.4%. Over the past five years, each of the top three companies experiences similar growth. Sapporo Holdings experienced slightly more growth at 33.8%, while Otsuka Holdings increased by 30.1% and Red Bull grew by 25.1%.

The popularity of global brands in both FF packaged food and FF beverages may be due to a combination of the lack of domestic processors, and the preference of local retailers to launch imported brands in order to cater to their mainly foreign customers.

## Health claims

There has been growing media coverage and medical focus on vitamin D deficiencies in the UAE. Residents spend less time outdoors during the hot summer months, making them more susceptible to become deficient, thus they seek foods that are fortified with vitamin D. There is also growing popularity of packaged foods that have been fortified with omega 3. In FF beverages, the most common functional ingredients are caffeine, taurine, electrolytes, and vitamin C.

Any product that has a health claim on its label is required to go through an approval and registration process with the UAE ministry of health. Therefore, many companies have refrained from making exaggerated claims on their products.

## Retail outlets

In 2015, 87% of FF packaged food sales were in modern grocery retailers, such as hypermarkets, supermarkets, and convenience stores, and 13% were in traditional, small independent grocers.

Distribution of FF beverages has been more varied, with 68% of sales in modern grocery retailers, and 24% in traditional grocery retailers, and 8% in vending machines. In addition to hypermarkets, supermarkets, and convenience stores; forecourt retailers are also among the modern grocery retailers distributing FF beverages. Sales of FF beverages in hypermarkets has been increasing due to the popularity of FF energy drink multipacks and consumers adding these products to their regular groceries.

## Conclusion

Over the forecast period (2016 to 2020), it is expected the FF packaged food will continue to increase at a similar compound annual growth rate as during the review period (9.3%). Given the focus on vitamin D deficiencies, there may be increased opportunities for products that are fortified with vitamin D. Convenience products that appeal to consumers with busy lifestyles are also expected to do well, especially if they are marketed as being innovative or luxury items. It is expected that retail sales of functional products will benefit from the UAE hosting EXPO 2020, as there will be an influx of visitors to the region. Therefore, there may be particular opportunities for products targeted toward the foodservice industry. Because of the diverse ethnic and income groups within the UAE, it is important for Canadian companies to properly identify their target market as well the appropriate retail outlets that accommodate that market.

## For more information

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in the United Arab Emirates**
  www.tradecommissioner.gc.ca/ae

- **Find a Trade Commissioner**
  www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

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For information on Gulfood 2017, please contact:

- **Ben Berry, Deputy Director**
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## Resources

Euromonitor International, 2016. *Fortified/Functional Beverages in the United Arab Emirates.*

Euromonitor International, 2016. *Fortified/Functional Packaged Food in the United Arab Emirates.*

Mintel Global New Products Database, 2016.

***Health and wellness series***

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